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Mitel Special Edition

# Customer Experience

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## **Learn to:**

- Evaluate your existing strategy
- Provide the optimal customer experience for today's mobile consumer
- Avoid the pitfalls of an outdated approach



**Elaine Marmel**

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A global market leader in enterprise and mobile communications, Mitel powers more than 2 billion business connections and 2 billion mobile subscribers every day. Mitel helps businesses and mobile carriers connect, collaborate, and provide innovative services to its customers. Its innovation and communications experts serve more than 60 million business users in more than 100 countries and 130 mobile service providers, including 15 of the top 20 mobile carriers in the world. Mitel is uniquely powering the mobile enterprise by using the real-time cloud.

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**by Elaine Marmel**

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## **Customer Experience For Dummies®, Mitel Special Edition**

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# Introduction



**B**usiness owners (and non-profit, healthcare, and government agencies) know that many factors — the costs you incur to produce, market, and support your product, as well as the quality of the product you sell and how satisfied your customers are with their buying experience — affect their success. In fact, customer satisfaction has become a game-changer in the digital technology age . . . more than any other factor influencing profitability.

The way people communicate with each other has evolved, but what about the way that your business communicates with your customers? Today's consumers carry with them technologies like smartphones that enable them to connect with your organization in seconds and communicate with hundreds of their closest friends instantly. Because of these technologies, customer satisfaction can make or break your business.

To survive and profit, today's businesses need to focus on their customers. Businesses need to know and understand the customers they serve, address the methods of communication their customers prefer to use, and evaluate their businesses based on the quality of customer experience they deliver.

Are you up to the challenge?

## *About This Book*

If you aren't striving to listen to your customers, meet their demands, exceed their expectations, and deliver consistent, quality customer experience, you risk losing your loyal customers, your potential customers, your profits, your reputation, your employees, and even, ultimately, your business.

This book is aimed at decision makers and influencers who can drive the way your organization chooses to meet the demands of providing the best possible customer experience.

It's also aimed at those people who must support the decisions made about the methods you choose to offer your customers a superior experience when they interact with you.

Use the information in this book to help you understand how the customer experience has been changing and how to meet the challenge presented by this evolving experience. Identify the customers who buy from you most often and examine the methods they use to communicate. Take a look at the ways you currently support your customers and the potential factors that prevent you from providing an outstanding customer experience. Finally, consider the ways that offering an outstanding customer experience can pay off and examine techniques you can employ to ensure success with your customers.

## Icons Used in This Book

Throughout this book, I occasionally use special icons to call attention to important information. You won't see any smiley faces winking at you, but you'll definitely want to take note! Here's what you can expect.



This icon points out juicy tidbits that are likely to be repeatedly useful to you — so don't forget them.



Think of these icons as the fodder of advice columns. They offer (hopefully) wise advice or a bit more information about a topic under discussion.



Danger, Will Robinson, danger! Well, okay, the information isn't really life-threatening. In this book, you see this icon when I'm trying to help you avoid mistakes that can cost money.

## Beyond the Book

This book can only cover so much in 48 pages. However, you can find more information at [www.mitel.com/cc](http://www.mitel.com/cc). Discover what Mitel's customer experience solutions and services are, watch webcasts, read whitepapers, and much more!

## Chapter 1

# Recognizing the Evolving Customer Experience

### *In This Chapter*

- ▶ Examining a customer buying experience prior to the digital age
- ▶ Examining the same experience happening digitally
- ▶ Understanding that the digital experience is expanding

**W**ith the advent of the digital communication age, customers have new ways to communicate and shop that didn't exist 30 years ago. Effectively, for the customer — and therefore for your business — the world has become a much smaller place.

## *Taking a Walk Down Memory Lane*

To understand just how things have changed with the onset of digital technology, this section examines the marketplace 30 years ago and compares it to the marketplace today.



You could go back more than 30 years ago, but that isn't necessary to demonstrate just how much the buying experience has changed for today's consumer.

## *From the brick and mortar store . . .*

Thirty years ago, customers shopped at local shopping malls. They visited their doctors' offices to get test results and phoned hotels, airlines, and car rental agencies to make reservations. (And, sometimes, they simply went to travel agencies to have someone else make all their arrangements.) They checked into hotel rooms and airline flights at the hotel's front desk and the airline ticket counter. Thirty years ago, customers purchased pizza and tickets to sporting or cultural events by standing in line or making telephone calls.

The buying experience was completely different 30 years ago. Take a look at the 30-year-old financial transaction experience.

If a customer wanted to make a savings account deposit or withdrawal, he brought a bank-issued *passbook* — a record of the account's deposits and withdrawals — with him on his trip to the bank, along with the money — cash or checks — that he wanted to deposit. The bank teller would record the transaction in the passbook and stamp the passbook to make the transaction official. The passbook entry was the customer's receipt from the bank for the transaction and the passbook showed the balance in the account.

If a customer needed to deposit one or more checks to his checking account, the process changed somewhat. The customer would manually prepare a deposit ticket, typically, but not always, at home. The deposit ticket identified the amount of the checks and, in some cases, the names of the people who issued the checks. The deposit ticket would also contain the bank's routing number and the customer's account number.

The customer then went to the bank, where he waited in line until a bank teller could help him. (If he hadn't completed the deposit ticket at home, he'd fill one out at the bank.) When the customer reached the teller's window, he'd present the checks and the deposit ticket. The teller would work some magic with the bank's equipment to record the transaction, keep the checks and the deposit ticket the customer completed, and then provide a deposit receipt to the customer. The customer would keep the deposit receipt as his record of the transaction until the account statement from the bank

arrived in the mail. Once the customer confirmed the deposit on the bank statement, he could, if he wanted, throw the receipt away. The customer was responsible for keeping a record of the deposit.

Customers used their checking accounts when they spent money. If a customer bought something from a store at the local mall, they often wrote a check to pay for the item — and typically they had to present at least two forms of identification before the retailer would accept the check because retailers had no assurance that the customer had enough money in the checking account to cover the cost of the purchase. The customer's only alternative was to pay with cash.

To obtain cash, customers wrote checks to themselves, went to the bank, stood in line for a bank teller and presented the check. The teller would check the account's balance and provide the cash.

Customers paid phone, electric, water, and other bills by writing checks and mailing them to vendors. As the customers wrote checks, either to pay bills or to make a purchase from a store at the local mall, they would record information about each check — the date it was written, the name of the check's recipient, and the check amount — in the *checkbook register*. Customers also recorded deposits in the checkbook register so that they could determine the account's balance at any point in time.

Vendors who received checks from customers as payment for items purchased at stores or for phone, electric, water, and other bills would bring the checks to a bank as deposits, completing deposit tickets and waiting in line for a teller, as previously described. The banks would keep the checks the vendors presented and return them to the customer along with the account's monthly statement.

Before the digital age, your customer's experience involved a lot of people and required a lot of time invested both by businesses and by customers, creating a lot of points in the buying experience where things could go wrong. And, your customer's experience was localized. That is, if a customer had a bad experience — like having to wait in line for an hour — he might tell three or four people or, at most, five or six people.

My, how things have changed.

## *... into the digital age*

With the advent of the digital age, today's customers shop online. They check their healthcare test results online. They text, tweet, or use a browser to make reservations at hotels, airlines, and car rental agencies, and to purchase tickets to sporting or cultural events. They check into hotel rooms and airline flights online. They even text emojis to purchase pizza!

Today, customers handle financial transactions totally different. There's rarely any need to physically go to the bank. You can make a deposit to any bank account — checking or savings — by using your smartphone and your bank's mobile app. The app prompts you to select the account in which to deposit the money and supply the amount of the deposit. You then take photos of the front and back of each the check you intend to deposit — no more deposit tickets — and you tap Send. The app connects with your bank and, in a few seconds, you see a message on your smartphone indicating that you've made a deposit. And, that message is, essentially, your receipt.

Customers can still write checks today to pay for goods or services they purchase, but most don't because of the hassles associated with providing identification. Most customers find it much easier to simply use debit cards to make a payment directly from a checking account. Or, they use credit cards to postpone payment until they receive a bill from the company.



Even the way customers use debit and credit cards is changing; they don't need to swipe a card, sign, or enter a PIN anymore. They just tap on the machine or use their phones to charge their cards.

To pay bills from the electric company or the gas company, customers can write checks but again, most find it simpler and easier — and cheaper, since there's no postage involved — to visit their bank's website and use the bank's online bill payment tool. Online bill payment tools enable the customer to set up vendors just once and then pay them whenever bills come due.

For the most part, banking has become self-service. When customers need cash, they can go to the bank, but they no longer need to go inside. They can, instead, use the bank's

automated teller machine (ATM) to withdraw money from any account. Fewer people are involved in the transaction, and customers spend less time in line, not to mention that they also bank on their own schedules.



Customers can also make deposits at ATMs, but, why bother when using a smartphone is so much easier?

Customers can check the balances of all bank accounts by logging in to their bank's website either via a browser or using their smartphone's mobile app. The way customers handle financial transactions has essentially eliminated the need for savings passbooks, checkbook registers, and, in most cases, even writing checks.

## ***Mobile Commerce is Expanding***

Effectively, a customer's interaction with a business today rarely occurs in person. Most contact happens through electronic means. Thirty years ago, businesses drove technological advances. But today, *consumers* are driving technological advances. They are demanding the ability to interact with your business in the way that is most convenient for them.

Further, today's consumer choices have broadened; they aren't limited to visiting the local mall to shop. Instead, using digital technology, they can shop anyplace in the world. Just think Christmas: Because of expanding mobile commerce, customers can get their shopping done at the busiest time of year without setting foot in a store or post office.

Not long ago most of us limited the use of our mobile devices to finding basic information. We reserved conducting highly personal interactions, like shopping for goods or making financial transactions, to a more "secure" location, like the local store or bank. We didn't yet trust that our devices were secure enough to enable us to safely make purchases or pay bills.

Today, many of us are confident that these issues have been resolved. We're more willing to complete the transaction on a mobile device. And, because so many of us are willing to use mobile devices to shop or bank, we're in a position to make and execute purchase decisions 24 hours a day, 7 days a week, and 365 days a year.

That kind of demand from customers puts today's businesses in the hot seat. You've always had to meet your customers' needs; now, you have to do so at an increased pace, during new hours, using new methods. While voice-based communication with customers still plays a strong role, consumers are increasingly looking to digital communication methods and demanding the flexibility to interact with companies through the customer's preferred media.

And, because customers are no longer limited to making purchases locally, you have to make certain that providing positive customer experience moves up in the hierarchy of your business's priorities. In this way, your business goals will reflect the importance of customer satisfaction and help you keep existing customers and gain new ones.

To compete and grow your revenue, you've always had to understand who your customer is, but today, that understanding is even more important. Without sound knowledge about your customer, you can't expect to deliver an outstanding customer experience.

# Chapter 2

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# Examining Today's Customer

## *In This Chapter*

- ▶ Understanding who today's customers are
- ▶ Examining buying habits
- ▶ Taking a look at the Internet of Things
- ▶ Understanding the consequences of negative customer experiences

**B**ecause customers' interactions with businesses have changed and evolved with the introduction of digital devices, traditional customer service measures are no longer adequate. As a result of these rapidly evolving trends, an outstanding customer experience is (or should be) top of mind for C-level executives.

Although you've always needed to know who your customers are to succeed in business, today knowing your customers and how they want to interact is more important than ever. In addition to knowing how long a customer has been purchasing your products, you need to take a look at the myriad buying methods and patterns used by today's consumers. That is, you must understand who is out there buying your goods and services and the means they tend to use to make purchases. And let's face it; today's digital economy has redefined customer service. Your customer's expectations of customer service are higher than they've ever been before. Knowing who your customers are will help you determine the best ways to communicate with them and offer outstanding service along with goods.

## *Who Is Today's Customer?*

Today's consumer spans a variety of generations, ranging from the post-war era to today's teens (and even younger, because digital capabilities provide the means to buy without going into a local store). And each of these consumers prefers a different way to communicate. Because all of them are your customers, you're now facing new challenges in the ways you interact with them.

Demographically, the various generations of people have been given generally accepted names:

- ✓ The Post-World War II generation
- ✓ The Baby Boomers
- ✓ Those from Generation X
- ✓ Those from Generation Y (also called the millennials)
- ✓ Those from Generation Z

A major segment of the buying population comes from the post-war era, the Baby Boomer era, and Generation X. Although where a person fits in these generations is a matter of opinion, most people accept that these folks were born between 1928 and 1976 and came of age between 1946 and 1994. Today, they range in age from 49 to 70.

The rest of the buying population comes from Generation Y and Generation Z, and they also comprise a significant number of consumers with significant spending power. Again, most people generally accept that Generation Y and Z people were born since 1977 and came of age between 1998 and now. Today, they range in age from 10 to 32.



Some demographers divide the Baby Boomer era into two groups: those born between 1946 and 1954, and those born between 1955 and 1965. These demographers label the two groups as Boomers I or the Baby Boomers, and Boomers II or Generation Jones. For this discussion, I view these folks as one group and refer to them as the Baby Boomers.



Don't forget about business-to-business transactions. To provide an outstanding customer experience to the people with whom you do business, determine which generations are typically the decision makers in the businesses to which you sell goods and services, and identify the means with which they're most comfortable making purchases.

## *How, Where, and Why Consumers Interact*

Those from the post-war era, the Baby Boomer era, and even many Generation Xers are often, though not exclusively, most comfortable frequenting brick and mortar stores and communicating with sellers via telephone or in person. Although they're declining in numbers, they're a large enough population buying your goods and services that you need to be able to cater to their needs.

Generation Y and Generation Z have grown up with technology. They're increasingly mobile and tech-savvy. They're connected digitally to the world more than any of the previous generations. They prefer to use smartphones to communicate electronically to shop, text, tweet, check email, and surf the Internet. They rarely use their smartphones to actually make phone calls (a factoid that often baffles the older generations — after all, it *is* a phone!) and tend to reserve phone calls for keeping in touch with parents and grandparents. Most Generation Y and Z folks would rather text, tweet, or use a browser to order a pizza than call to place the order.

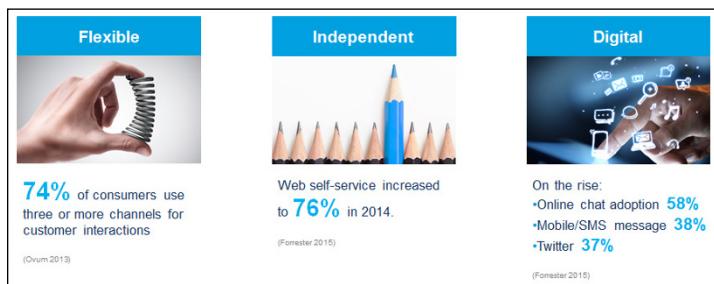
Generations Y and Z tend to be mobile in their use of technology. Although the other generations may not be as mobile in their use of technology, many of these folks are just as gadget-happy as the folks from Generation Y and Z. The post-war and Baby Boomer generation might not comfortably shop from their phones, but many of them have migrated more and more to shopping online using some flavor of computer — a desktop or a tablet, for example — and a web browser.

The online buying population is huge.



Many of the very elderly rely on younger family members to help them buy the things they need — and, of course, the younger family members are, most often, fans of shopping digitally.

It's safe to say that today's consumers, regardless of generation, are self-reliant and happy to manage their relationships with a business without any human interaction (see Figure 2-1).



**Figure 2-1:** Today's consumers are comfortable serving themselves.

Today's consumers expect the flexibility and convenience of interacting with your business using the methods that make the most sense to them at any given time, using mobile apps, the Internet, email, SMS text messaging, and social media. Respected market research organizations are pointing to the fact that, over the coming years, companies will no longer be able to rely on voice communications to handle inquiries and process new business.

For a seamless, truly digital customer experience, your business should be equipped to provide the same prompt, informed customer service across all channels.

## *Understanding the Internet of Things*

The Internet of Things (IoT) can improve the customer experience today while also having a significant impact on improving it in the future.

“How does that work?” you ask.

Well, to succeed in today’s business world, companies need to become customer-centric. Customer-centric organizations anticipate future needs by looking at behavioral patterns and market trends and leverage data from inside and outside their organizations. They provide unique, memorable experiences that are seamless across all of the possible interaction channels. And, most importantly, customer-centric organizations define themselves not by the products they make and sell, but by the customers they serve, the customer problems they solve, and the quality customer experience they deliver.

Understanding your customer inside and out so you can anticipate future needs, proactively engaging them, and continually exceeding their expectations is the most difficult part of becoming a customer-centric organization.

For almost a decade, “things” — electronics, sensors, and software that can be sensed, monitored, and controlled remotely across network infrastructure — have used the Internet more than people. This network of objects is commonly known as the IoT. Gartner forecasts 4.9 billion connected things will be in use in 2015, up 30 percent from 2014, and that this number will reach 25 billion by 2020.

The rise of the IoT has accelerated the ability to monitor, measure, and manage customer experience and product use, driving significant change in the way businesses interact with customers, and transforming customer experience forever.

Want a simple example? The microchip you can place in your dog can be used to track him and return him to you if he gets lost. Talk about offering a positive customer experience; most dog owners will tell you that their dogs are almost as important to them as their children.

But the IoT can offer so much more. Consider the case of the connected car. Having an Internet-enabled car is one thing, but the customer experience benefits of a connected car far surpass being able to tap into the Internet for access to cloud-based music services or maps and navigation technology. Using sensors installed in cars, drivers can now proactively monitor almost everything in the car, from the engine, to lights, to tire pressure — and then receive warnings and

notifications in the event the car needs parts or maintenance. For the customer, the connected car can mean no more getting stranded in the middle of nowhere dealing with car troubles.

And, the connected car is equally important to the car company, since it allows them to collect valuable user and performance data from vehicles that can be funneled back into the design of future vehicles to improve usability and performance.

The IoT gives businesses a new opportunity to use customer data to improve customer experience and proactively improve their product/service.

The key value and challenge associated with the IoT is making sure that the data promptly winds up in the right hands. That is, all these devices are collecting data, but a business needs that data routed to the appropriate person. It's one thing that the connected car notifies you when your engine needs servicing. But technology designed to leverage the IoT expands the value because it automatically routes the information to the correct area within the dealership (service representative, mechanic, and so on) to contact the customer — by phone, automated email, or text message — to schedule an appointment.

## Why Does it Matter?

Today's consumer is intelligent and will shop where he can get the best service, the best product, probably at the best price — essentially, the best customer experience.



In today's digital world, customer loyalty is difficult but not impossible to achieve. Because customers have so much information at their fingertips, they can compare you to your competitors in seconds. Offering an outstanding customer experience can differentiate you from your competition even more than a lower price point.

Businesses must understand mobile consumer behaviors to ensure that they're positioned for success and can guarantee that customers get the service they expect. Clearly, though, the responsibility for delivering a satisfying customer experience has never been more complex. Businesses must support

customers using multiple channels of communication. In addition, with digital devices increasing the speed with which commerce is happening, customers have come to expect instant responses. Today's organization must adapt to provide a convenient, satisfying and consistent customer experience at all times.

And what happens when you don't?

Well, mobile consumers have more than just access to the information they want at the tips of their fingers and the ability to execute a transaction at their convenience. They also have the ability to share that experience in real time with their closest friends, who are your customers and prospects. According to We Are Social (<http://wearesocial.net>), nearly one in four people now has an active social media account on his mobile device.

In other words, these customers can share their satisfaction or dissatisfaction with countless people in the blink of eye.



A negative customer service story on social media can go viral with the click of a mouse or a tap of the finger.

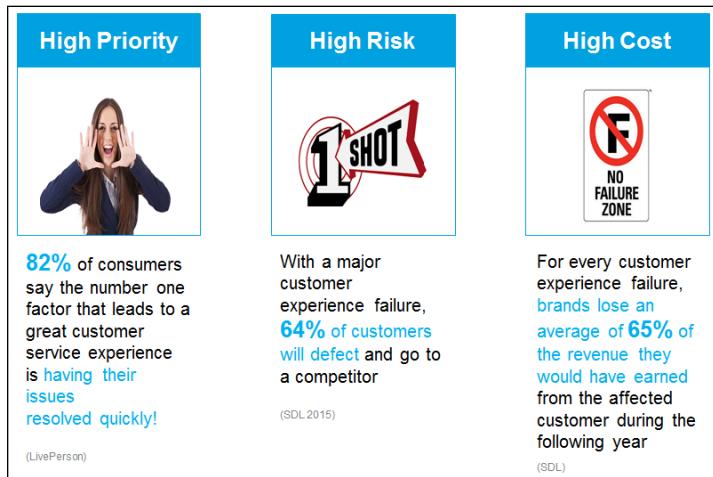
And, it's becoming increasingly clear that customers are powerful word-of-mouth marketers; a positive customer experience can result in 69 percent of customers recommending a company to others. On the flip side, 79 percent of customers will readily share any negative experience (Harris Interactive).

Customer experience has a multiplicative effect, both positively and negatively (see Figure 2-2).



**Figure 2-2: The impact of customer experience.**

There isn't a company in the world that is immune to the impact of delivering poor customer experience. With customer advocacy being a crucial competitive differentiator, it's critical to understand your customer. Figure 2-3 presents the high priority customers place on the customer experience and the high risk and high cost a business faces if it delivers a poor customer experience.



**Figure 2-3: A poor customer experience is risky and costly.**

Today's customers want and expect:

- ✓ Personalized and proactive experiences
- ✓ Relevant and timely information
- ✓ Quick response times

## Chapter 3

# Assessing the Current Situation

### *In This Chapter*

- ▶ Identifying the people who interact with your customers
- ▶ Examining the way you support your customers today
- ▶ Evaluating the cost of maintaining the status quo
- ▶ Looking ahead

I've established that the evolving customer experience is changing the way you need to do business. Research shows that the consumer population uses multiple channels when reaching out for customer service or making a purchase. So how does this shift affect your bottom line? And, are you in a position to address the needs of your customers? This chapter gives you more information.

## *Identifying Customer Experience Influencers*

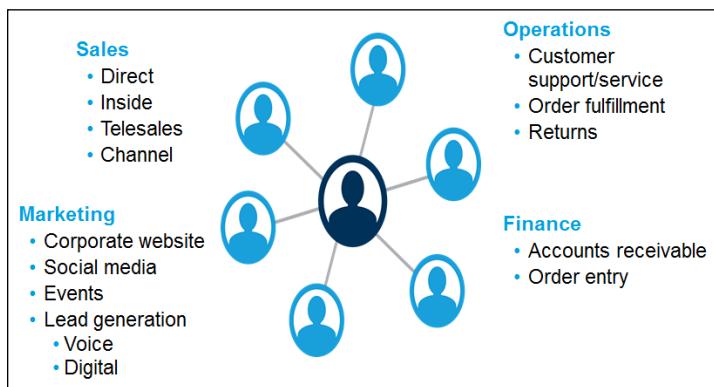
First, today's consumer is trying to engage with you using digital devices. They want to be able to use your website to buy things and to search for answers. They want to be able to interact with you via text, tweet, or email.



The percentage of your customer population that wants to call and talk to you is shrinking.

Digital communication is fast-paced, so, your customer expects answers very quickly. How does the new speed of doing business affect the customer experience you provide?

Your customers need to connect with the right person to resolve their issue — and (big surprise here) they need to connect quickly. So, even if you've dedicated employees to handling interactions with customers, today's customer experience dictates that other people in your organization — who may not have had any direct affect in the past — are now influencing the customer experience. Twenty percent of contact center interactions require collaboration with general business staff — that puts 20 percent of great customer experience at risk. Check out Figure 3-1 to see examples of customer touch points within your business.



**Figure 3-1:** Twenty percent of customer interactions with a business require collaboration with general business staff in your organization.

To provide an outstanding customer experience, all these touch points need to interact, both as groups and using technology.

## Examining the Current Setup

Today's world of business is increasingly fast-paced, competitive, technology-led, and global. Cultural, technological, and physical elements are working together to drive a rapid pace of change like never before.



Digital technology affects not only the customer experience but also the employee experience you offer. See the sidebar, "Digital technology and employees" for more information.

## Mobile technology and employees

Digital technology has enhanced more than your customer's way of communicating with you. It has actually widened your employee pool. Digital technology enables you to use remote workforces.

Workers today want to bring their own devices into the workplace and

they want flexibility to work where, when, and how they want. If your business can provide the right infrastructure to accommodate personal devices and employee choices, you could expand your resource pool so that you have the absolute best people providing your customers with an outstanding customer experience.

Many customer experience strategies and solutions simply don't provide a seamless, predictable customer experience over all channels of communications that customers want to use:

- ✓ Many support only voice communication and don't address the need for multichannel communication with your customers.
- ✓ Many of these solutions connect to only a small percentage of your employees and don't address the need to put the right person in the right place at the right time. Effectively, these solutions create silos within your organization and separate your employees from the business intelligence they need to provide an outstanding customer experience.
- ✓ Your solution may not have the technology tools necessary today, such as customer relationship management (CRM), screen pops, customer profiling provided by interactive voice response systems, and data retention from one interaction to another, just to name a few.



Screen pops appear on your employee's desktop and display information such as caller ID and CRM information for a call simultaneously sent to the employee's telephone.

- ✓ Existing solutions may not have tools for monitoring calls and coaching employees.

Even if you have procedures and technology in place to handle customer interactions, you need to examine them to

determine if they will truly meet your needs today and in the future. If you don't have procedures in place, you need to establish them to

- ✓ Compete with the big guys
- ✓ Differentiate your business, and
- ✓ Improve sales

## *Understanding the Costs and Complexity of the Status Quo*

For many, not only will today's technological and procedural environment likely not meet their needs, but also it's expensive to maintain. If you look across your organization, you may have multiple teams responsible for the customer experience, (eCommerce, order entry, product support, inside sales, telesales, customer care, the help desk, and more).

Each team has specific areas of responsibility, potentially in different departments using different solutions that were handpicked by each team based on its specific requirements. Each team has limited visibility into what the other teams are doing or what technology they're using. Generally speaking, this approach has worked in the past as long as each team met its objectives. But, this approach creates departmental silos. And, deliberately or accidentally, silos don't share the business intelligence needed to serve customers properly. So, from the very start, you can't provide the quality of service your customers expect — because your employees don't have the information they need to do their jobs.



Silos encourage the destruction of a productive company culture.

Then, there's the technology side of things to consider. Each of these teams might be running its solution on a dedicated infrastructure with its own hardware and software, and administrative personnel. In all likelihood, each infrastructure has been designed to ensure that it can scale to support the required traffic volumes and employees and is available when customers need it, even during peak periods. To build such an infrastructure requires a significant hardware, software, and administrative investment, including components such as

- ✓ Development environments, often built at 25 percent of production capacity to ensure the infrastructure works the way it needs to work
- ✓ Test environments, often built at 50 percent of production capacity to ensure the infrastructure will be able to handle the load
- ✓ Production environments, built to support the maximum possible traffic load, regardless of how often that volume is hit

Creating all these separate infrastructures for multiple teams in a single organization requires servers . . . a lot of servers. And servers aren't cheap.

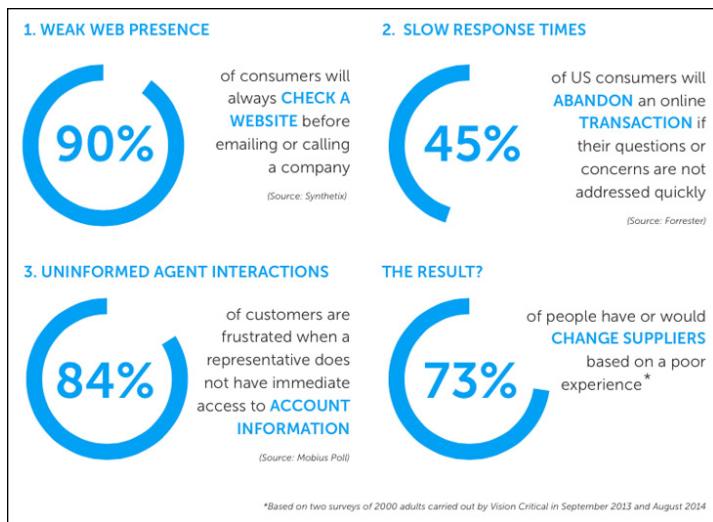


This sprawling setup has led many companies to explore using the Cloud to support the customer experience. Some (a certain tech giant) are even considering turning to the last place on earth where we currently aren't storing data — under the sea.

Your IT department is probably charged with the responsibility to maintain all of these disparate systems and associated hardware and software, and, if you talk to them, you'll find that they spend their lives fighting fires instead of providing your organization with the support it needs to effectively do business. Your organization falls further and further behind the goal of providing an excellent customer experience.

And, so, your customer suffers — and probably looks for a new vendor.

Because today's customers aren't static — they're constantly changing and evolving as they conquer new ways to take advantage of digital technology — you need to be relentless in capturing relevant customer information. You need to do more than gather intelligence at the start of an interaction; you need to carry the intelligence throughout the entire life-cycle of the interaction and customer history. With the right approach and technology, you'll be able to spot untapped opportunities to increase revenue per customer. If you ensure that content is relevant, you'll be able to reduce customer churn and build loyalty. Figure 3-2 identifies the top three customer frustrations in the digital age.



**Figure 3-2: The top three customer frustrations in the digital age and their result.**



According to Forrester, when you handle a customer by telephone, the call costs you between \$6 and \$12. But, you can provide web self-service for less than 10 cents. The bottom line is that 55 percent of customers would pay extra to guarantee better service, according to Defaqto.

## So, Where Do You Go From Here?

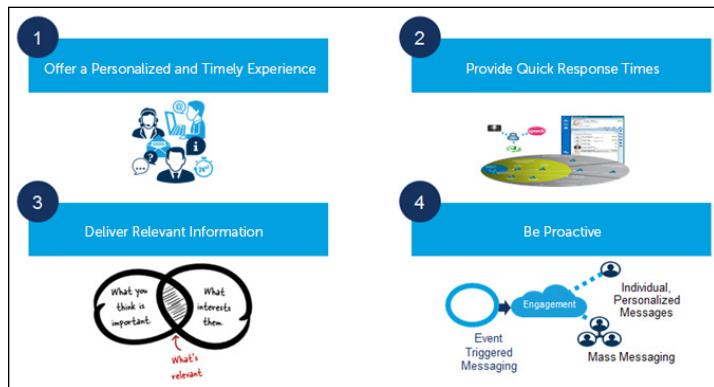
Economic downturns and an evolving marketplace have made reducing costs and increasing operational efficiency increasingly crucial. And don't forget about remaining compliant with industry regulations and policies. Your challenge lies in offering a flexible, intimate customer experience without compromising your bottom line.

Your traditional brick and mortar experience still exists, but you also need to support new ways of customer communication. If your company hasn't yet formalized its way of

interacting with customers, you need to address this need. And, if your company has a formalized approach for handling customer interactions, current tactics and technology aren't likely to sufficiently meet evolving requirements.

But before you start focusing on new tactics and technology, make sure that you're being strategic and not tactical. Identify your customer and evaluate your customers' communication needs.

Then, build your strategy around those needs so that you can improve your customers' experiences. Figure 3-3 identifies four best practices you should strive to follow while building your customer experience strategy. These best practices help you ensure that your customer experience strategy is closely aligned with the ways your customers are buying.



**Figure 3-3: Four best practices for building a customer experience strategy.**

Look across your organization and determine all the possible points of engagement. Anticipate how customers expect to engage: via email, web chat, text, voice, video, social media, self-service, or other touch points. Then develop a strategy that ensures you have the right person in the right place at the right time to support customer requests as quickly as possible — before a consumer has the chance to deflect, take their business elsewhere, and share their negative experience.

Remember the following key points:

- ✓ Customers expect a flexible experience with digital media. Your business needs to be ready to respond on all channels at all times.
- ✓ Negative experiences can go viral! Workflows must be defined to ensure customers are connected to the right people in your organization with the right skills for the interaction, and these people must have the right tools to provide informed responses.
- ✓ Providing a convenient, digital experience improves customer loyalty and paints a positive picture for word-of-mouth marketing.

## Chapter 4

# Understanding the Value in Getting it Right

### *In This Chapter*

- ▶ Knowing your customers and balancing their needs
- ▶ Understanding that excellent customer experiences generate revenue
- ▶ Using the right tools to provide an outstanding customer experience increases the productivity of your employees
- ▶ Taking advantage of the Internet of Things to increase profits

**O**ffering an outstanding customer experience can only help you. When your business exceeds the expectations of your customers, you'll find that you are retaining customers, turning them into loyal and lifetime customers, and adding new customers.

Don't forget that today's consumers carry with them technologies (the Internet, social media, email, text messaging, and more) that they can use to contact your organization — or your competition — in seconds. You need to be able to respond in seconds.

With the ability to share experiences at their fingertips, your customers' marketing endeavors can make or break your business. If you embrace the concept of offering an outstanding customer experience in the age of digital devices, you stand to gain everything and lose nothing.



## Balancing Customer Needs

In Chapter 2, I identify today’s customer pool and its buying habits. Within the next ten years, Generation Y-ers (the Millennials) and Generation Z-ers will represent the majority of the workforce and the buying population. These folks were the first to grow up with computers in their homes, and they are by far the most tech-savvy generations yet.

These generations are success-driven, goal-oriented, determined, confident, and highly technology-dependent. These qualities are all exciting, but they also make these generations highly demanding as consumers. They expect quality service, they expect it now, and they like things short and sweet because they’re excellent at multitasking. And, they aren’t as loyal to brands as customers once were.

These characteristics have led to a fundamental shift in the way enterprises must do business — rather than nurturing long-term brand loyalty, businesses need to be able to respond to the desire for instant gratification.

So, how can businesses better serve Millennials and Generation Z-ers? Here are some ways:

- ✓ **Provide robust information.** These generations aren’t afraid to do their research, and they know where to find the answers they need. As a result, information needs to be readily available to them, easy to find, and highly educational or entertaining.
- ✓ **Be available.** These generations are online day and night, and in this 24/7 world, they expect businesses to be the same. They want to be able to access your business when they want to — and through the channel of their choosing.
- ✓ **Be social.** These generations aren’t afraid to share the things they like (or dislike). They live on social media and want to be able to reach you through Facebook, Twitter, Yelp, LinkedIn, and other social platforms. Be present and be part of their conversations.

Even though Millennials and Generation Z-ers make up a large percentage of the buying populations, the other generations

are still present and still buying. At this point in time, you can't afford to ignore any segment of the buying population. So, in addition to the buying and communication channels that Millennials use, you also need to support the channels preferred by the other generations. Figure 4-1 shows these different channels.

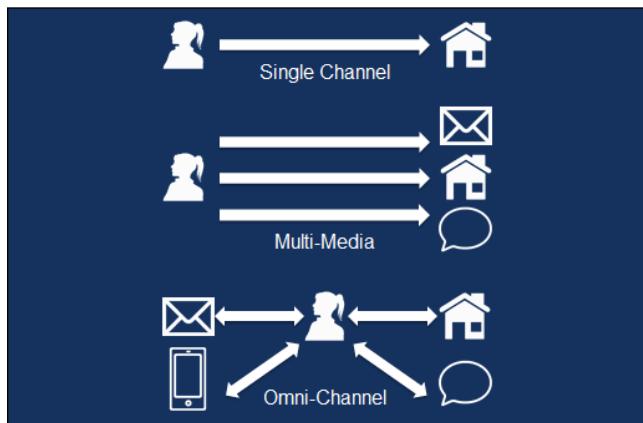


Figure 4-1: The changing customer experience channels.

## Tracing changing customer experience channels

The single channel approach corresponds most closely with the customer experience before the rise of digital technology, where the customer communicated at a brick and mortar store. With the integration of digital technology into the customer experience, customers interact using multiple electronic media, including voice, the Internet, emails, text, and the brick and mortar store, and they expect to be able to pivot between channels while maintaining the context of their interaction. For example,

if the customer switches from email to text during an interaction, that customer expects your company to pick up the thread in text where it left off in email.

The omni-channel experience refers to the multichannel approach that aims to provide customers with a seamless experience regardless of the device (desktop computer, smartphone, or tablet) and channel (physical or electronic) they opt to use.

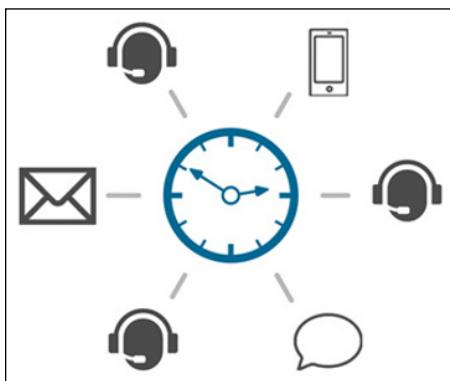
It's safe to say that digital channels are preferred by the majority of customers today. The only exception applies to most people in post-war era and Baby Boomer generations, who prefer voice communication. But it's equally possible that these folks may have children and grandchildren handling their customer interactions on their behalf — children and grandchildren who prefer digital channels.



While most businesses have voice communications under control, voice communications alone, as a method of customer interaction, is no longer adequate.

You can create an excellent customer experience if you

- ✓ Profile your customers to understand what drives them, the communications methods they use, and their schedules.
- ✓ Offer service across every possible communication channel and effectively manage the channels your customers prefer.
- ✓ Provide anytime, anywhere, any device, any browser services that offer seamless interactions 24 hours a day, 7 days a week, 365 days a year from anywhere in the world (see Figure 4-2).
- ✓ Deliver personalized service throughout the customer journey, learning and collecting new customer information from each interaction.



**Figure 4-2:** Provide service anytime using multiple communication channels for a truly customer-centric approach.

- ✓ Be transparent and flexible, letting customers know which media will result in the fastest responses and provide alternatives to waiting in queue.

## *Excellent Customer Experiences Generate Revenue*

Managing the customer experience has traditionally been treated as a cost center responsibility. The company's profit margins financed the function, which might have only indirectly contributed to profits.

However, as the customer experience has evolved and matured, communications with customers are more responsible for generating revenue than ever before. For example, a customer support team that responds to customers doesn't directly drive company profits. But if that team delivers poor customer service experiences, the resulting negative social media and bad press could lead to a significant decline in sales.

To make a customer support team a revenue generator as opposed to a cost center, businesses must ensure their operations are cost effective. Queues should be well-occupied, the right number of people should be fielding inquiries with the proper information at their fingertips, and the inquiries should be handled efficiently.

Businesses also need to verify the performance of their technology and the people answering the inquiries. With the right tools, businesses can do just that:

- ✓ Tools that offer real-time alarms inform supervisors of performance issues and inefficiencies so they can act immediately to maintain service levels and control costs.
- ✓ Tools that provide accurate forecasting, scheduling, and reporting ensure resources are effectively deployed at all times.

With the right reporting metrics, management can easily compare key performance indicators (KPIs) like average handle time, service level, or cost per interaction. Then, management can analyze these KPIs in the context of new sales, customer retention, and customer satisfaction.

Technology purchases are always easier to validate and approve if they can drive quantifiable results. With a digital customer experience platform, you can

- ✓ Handle more interactions with fewer people
- ✓ Stimulate sales growth and drive customer satisfaction with outbound email and text messaging
- ✓ Convert leads and increase selling opportunities by being available at each touch-point of the customer journey
- ✓ Automate customer service and support with self-service and outbound messaging responses for all media types
- ✓ Profit by your investment in social media

The people in your organization who interact with your customers are more responsible for generating revenue than ever before. Give them the tools to support their efforts and your business will benefit and grow.

## *Maximizing Productivity*

Interaction with customers has traditionally focused on handling incoming communication. And historically, technological solutions were designed to channel, monitor, and improve the performance of the people who answered telephones as they dealt with increasing numbers of inbound phone calls. But, with the growth of digital communication, the need to expand technological solutions has increased. The technology now needs to manage inbound communication to include text, email, Web, and social media interactions, and more.

In addition, the need to reach out to customers — that is, support outbound traffic — has risen. Previously, inbound and outbound customer support employees served two unique customer bases. Those who managed incoming communication handled incoming sales and support inquiries. And, those who handled outbound communication were typically limited to collections and telemarketing. However, as the technology solutions have become more robust and feature-rich, businesses have seen the value of blending the roles.

By blending the roles, customer support employees can both make and receive calls as well as digital communications. Today's technology optimizes productivity by ensuring that employees don't sit idle between customer interactions. Increasingly, inbound agents notify customers of changes to their accounts, payments due, or appointment reminders. And, because the technology supports it, customers can choose to receive these notifications by voice, text, or email messages. Your company's inbound call volume goes down, your customers are more satisfied, and your business's operating costs are lower.

## *Let the Internet of Things Improve Your Profits*

"How can the Internet of Things improve my profits?" you ask. By using the right technology, customer-centric organizations can look at behavioral patterns and market trends. The right strategy and approach can ensure that you completely understand your customer. With this understanding, you can anticipate your customer's needs, proactively (instead of reactively) engage with them, and continually provide an outstanding customer experience.

The rise of the Internet of Things (IoT) has fast-tracked the way businesses interact with customers. How? By increasing your business's ability to monitor, measure, and manage the customer experience and the way customers use your products. Getting the information you need and putting it in the proper hands to satisfy today's customers will help you keep existing customers and gain new ones, and your profits will rise.

## *The Bottom Line . . .*

Your business can only benefit by providing excellent customer experiences at every touchpoint. According to Harvard Business Review, the top performers in customer experience ratings achieve 2.4 times the revenue of the businesses lagging behind in maximizing the customer experience.



## Chapter 5

# Providing the Optimal Customer Experience

### *In This Chapter*

- ▶ Understanding the way to approach improving customer experiences
- ▶ Identifying best practices to implement improved customer experiences
- ▶ Exploring where to turn for help

**T**he people in your organization who interact with your customers become, either formally or informally, a strategic part of your business. Often, they become the brand face to your customers. They also can become either a major source of revenue generation or a significant cost center to be managed, depending on how well they do their jobs. These people can help you differentiate your business in a competitive marketplace by providing an outstanding customer experience every time they interact with your customers.



Before you can provide the optimal customer experience, you need to think beyond your support teams and really examine who in your organization impacts your customer experience.

Today's customers want to be self-sufficient. They aren't alone in this desire. Businesses also want to be as self-sufficient as possible in getting value from the people who directly engage with their customers. But you can't always achieve this self-sufficiency without help.

## The Big Picture

Businesses need to set strategic goals that enable them to continuously offer excellent customer service and experience. Reaching these strategic objectives can demand a great deal of business focus and investment, but the payoff will make the effort worthwhile.



The process is continuous; you don't wake up one day and say, "We're here! We're offering outstanding customer experiences." Instead, you need to be able to monitor the experience you're offering to make sure it continues to be outstanding, and to look for ways to make it even better.

You can implement technology solutions, but using the technology can still be a challenge. Digital and outbound interactions are ramping up, and then there are cloud considerations and regulations issues to address.

How do organizations manage their customer interactions? They use a range of specialized technology and management activities that focus on customer communications, business processes, resourcing, and more. But, while these activities can provide ultimately useful information, they are somewhat premature. You need to establish a clear set of objectives and a corresponding strategy to meet your goals.

## Best Practices for Getting It Right

Before you start doing anything or investing any money, you need to formulate a strategy that will get you where you need to go. Your strategy should include

- ✓ Understanding the customer journey and offering, and prioritizing channels accordingly
- ✓ Making anywhere, anytime, any-device interactions easy for your customers
- ✓ Providing the customer with a seamless, consistent experience across all channels and all touchpoints in the business
- ✓ Leveraging your existing infrastructure to create revenue-generating, differentiated customer experiences

A good strategy should help you translate business goals into technology solutions. It should

- ✓ Identify existing business processes and examine how your business wants to evolve or transform its processes to improve customer experience, reduce costs, measure outcomes, and more
- ✓ Include, if necessary, consulting expertise to align stakeholders to agree on their business roadmap before considering the technology
- ✓ Develop firm business requirements to begin the solution design; often, developing requirements needs deep architectural expertise in the technology environment and surrounding business applications
- ✓ Apply new solutions as well as upgrades, migrations, and expansions of existing solutions
- ✓ Help a business learn the state of its technology

## *Performing a health check*

Your strategy should include a health check from a reputable vendor that reviews your organizational structure (including all customer touchpoints), systems, and processes in depth and presents you with concrete, actionable recommendations on how to optimize your operations based on your unique business goals.

The health check should analyze the ways customers interact with you and the way work should flow. The health check also should help you determine whether your organization needs training on the processes and tools it uses to support the customer experience and provide you with a technology audit to help you gauge where you are today and identify strengths and weaknesses.

## *Analyzing customer interaction flow*

This flow analysis should determine the types of calls and digital communications your business receives and develop flow paths that provide advanced routing functionality for

your customers. That way, your customers can access the right information quickly and easily.



More often than not, customers will abandon transactions if their questions or concerns aren't addressed quickly.

You should receive a report that contains recommendations for changes that affect communications and application infrastructure. The report should also include suggestions for additional hardware and software that can help automate your business operations and enable you to optimize the level of service you provide to customers. And, most importantly, the report should contain suggestions for changes to business processes supported by technology to achieve better performance outcomes.

## *Analyzing work flow*

When you've identified customer interaction flows, you need to determine how communications should be handled after they've been processed and routed. During the work flow analysis, you should audit your systems to make sure that you completely understand them.

## *Training*

As part of your strategy, clarify business processes and operations and gauge your employees' familiarity with the technologies you use. Then, assess the efficiency enhancements you may gain by providing training on technology and on customer service and best practices.

## *Examining existing technology*

By taking an inventory of your organization's technology and that technology's performance, you can determine whether your business is moving in the direction you want to go to provide outstanding customer experiences. After you evaluate your existing infrastructure, work with a reputable vendor that can provide a wide breadth of capabilities and services to support you at every step of your customer experience strategy.



Technology inventory information provides a benchmark of where your business is now, so you can identify strengths and weaknesses in your technology investment.

## *Considering deployment options*

To establish your customer-centric technology strategy, you can choose to invest in additional on-site infrastructure or shift to cloud-based solutions — and the choice you make depends on many factors. For example, you might choose to invest in your own infrastructure if your organization is happy with its communication system and just needs to expand or invest in more advanced functionality, such as supporting digital communications. You might also choose to invest in your own infrastructure if your business operates in heavily regulated or scrutinized industries, such as the financial or healthcare industries, and is limited or restricted in how it manages, stores, and protects customer data.

Alternatively, if you determine that you have the option, you can establish an integrated digital framework that offers a unified customer experience using a cloud solution. A cloud solution can offer a unified customer experience more quickly than investing in your own infrastructure. And, the entire customer service process can be scaled up or down as required, based on the number and type of communications channels needed and the expected demand for service at any given time.



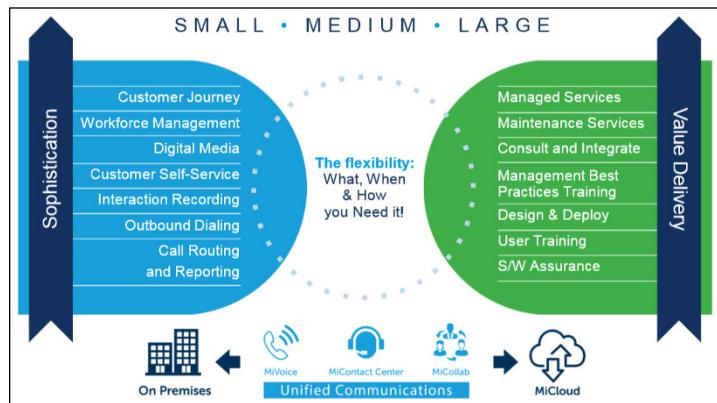
If you're unsure which deployment model makes the most sense for your customer experience, turn to a reputable vendor with experience in both premises- and cloud-based deployments for help.

## *How Mitel Can Help*

As you can imagine, during this process, you may find that you need some help both with establishing your strategy and with implementing it. Mitel can help you embrace the modern consumer, connect your enterprise, and adopt an agile business model, whether it's on premises, in the cloud, or using a hybrid combination.

Mitel's method for achieving outstanding customer experiences aims to streamline business processes, increase productivity, and improve first-contact resolution. This focus on customer experience improvement has been proven to yield a higher return on technology investment.

As shown in Figure 5-1, Mitel's portfolio of products and services is designed to support you at every stage of your customer experience strategy.



**Figure 5-1:** Mitel's portfolio supports your customer experience strategy end to end.

Mitel has helped hundreds of customers and partners to translate their customer needs and technology requirements into game-changing customer experience solutions designed to grow as their business dictates. This section presents some case studies that use Mitel's practice methodology for repeatable and predictable results.

## *Case study: Red Funnel Ferries*

Red Funnel Ferries is an integrated transport and travel business that runs ferries from Southampton to the Isle of Wight. Red Funnel Ferries is the oldest ferry service to the Isle of Wight and has been in operation since 1861.

From a communication perspective, Red Funnel Ferries was looking to enhance its customers' experience. Customers had started using new channels such as social media to interact with Red Funnel Ferries. It became vitally important to provide a customer-centric network where customers could communicate freely and easily with Red Funnel Ferries with questions on all kinds of subjects, including delays, cancellations, timetable inquiries, and even issues on board that

could arise. Red Funnel needed to recognize and evaluate these contacts in real time.

Previously, Red Funnel Ferris had a call center that was very reactive instead of proactive and offered voice-only communications with customers. Red Funnel Ferries wanted to increase the productivity of its team and improve the reaction time for its staff to deal with customer communications by providing the capability to handle omni-channel communications that included emails and social media, as well as voice communication.

In conjunction with Red Funnel's communications partner, Charterhouse Voice & Data, Mitel helped modernize the customer experience by connecting digital and mobile consumers with Red Funnel Ferries. Red Funnel Ferries now uses skills-based routing to ensure that its customers receive the best possible customer service. Its system ensures that a fully capable and qualified agent, trained to handle inquiries, responds to all queries. Red Funnel also uses social media monitoring to evaluate areas that would improve and enhance customers' experiences.

The results? Red Funnel has seen a marked improvement in terms of customer satisfaction and feedback as a result of that initiative. The company has decreased its customer complaints by 16 percent, but more importantly, it has increased its customer compliments by 116 percent year on year. And, Red Funnel won "Customer Experience Team of the Year 2015" and "Social Customer Service Team of the Year 2015" from the London & South East Contact Centre Forum Awards.

## ***Case study: Centrinex***

Founded in 2005 in Lenexa, Kansas, Centrinex is a national leader in contact center management and predominantly serves lines of business such as federal government, financial services, seminar groups, and inbound customer service.

In the past ten years, Centrinex has grown from a startup with ten employees to a powerhouse with 800 agents and three call center facilities. But its tremendous growth is no product of luck; Centrinex credits its success to performance measurement, recruiting, and training top talent and a commitment

to using advanced technology. Ever-conscious of shifts in the market and new ways customers wish to communicate with its clients, Centrinex recognized that introducing digital communications would not only improve customer satisfaction but also increase productivity by enabling agents to handle multiple customer interactions at once and with a quicker resolution time.

“The use of mobile and multimedia communications really lets us give consumers the choice of how, where, and when they want to connect with our company. If someone is out of the office or away from home, a cell phone call might be the best contact method, but, web chat might be preferred by someone sitting at his computer. With Mitel’s solutions, my agents can now manage a phone call, two email conversations, and a web chat all simultaneously and while delivering a superior customer experience for each,” said Bart Miller, Centrinex Founder and CEO.

Miller continued, “Each time we grew, each time we added more agents, each time we added more phone lines, each time we added more volume to the system, Mitel had a solution for us. They were able to provide us with everything we needed to move to that next level. It’s an easy decision for me now to want to grow to 1,000 people, 2,000 agents, 4,000 agents . . . [we know our] Mitel solution will be able to grow with us.”

So, how can Mitel help you? See Figure 5-2.

Embrace the Modern Consumer	Connect the Enterprise	Enhance Business Agility
<ul style="list-style-type: none"><li>• Simplify customer experience</li><li>• Optimize for mobile consumers: anywhere, anyway, any time</li><li>• Integrate social communications</li><li>• Maximize self-service</li><li>• Proactively engage</li></ul>	<ul style="list-style-type: none"><li>• Connect the entire workforce</li><li>• Connect your company data to personalize service</li><li>• Blend customer engagements</li><li>• Learn from industry best practices</li></ul>	<ul style="list-style-type: none"><li>• Optimize across departments, users, and media</li><li>• Flexible deployment options: on-premises, cloud, or hybrid</li><li>• On-site expertise: from design to consulting to fully managed service</li></ul>

**Figure 5-2:** The ways Mitel can help you.

## Chapter 6

# Ten Customer Experience Facts to Remember

### *In This Chapter*

- ▶ Summarizing the evolution of the customer experience
- ▶ Looking at important industry statistics

The customer experience is changing, and the use of digital services is rising astronomically. As a result of this changing experience, it has become imperative for businesses to be in a position to offer customers an outstanding customer experience or risk losing their businesses.



To offer your customers the best experience, keep these points in mind:

- ✓ Synthetix points out that 90 percent of today's consumers will always check a website before contacting a company.
- ✓ The Harris Poll found that 64 percent of consumers prefer texting over voice as a customer service channel.
- ✓ By 2020, 85 percent of customers will manage their relationships with businesses without interacting with a person, according to Gartner.
- ✓ Thirty-six percent of consumers utilize one to two channels when seeking customer care, and 64 percent of consumers utilize three or more channels, reports Ovum.
- ✓ Convergys asserts that the number of consumers preferring automated self-service has doubled to 55 percent in the last five years.

- ✓ 45 percent of United States consumers will abandon an online transaction if their questions or concerns aren't addressed quickly, according to Forrester.
- ✓ 84 percent of customers are frustrated when a representative doesn't have immediate access to account information, a Mobiush poll reported.
- ✓ The increasing use of social media on digital devices gives customers the means to share their experiences, making them either your strongest allies or your strongest enemies. Essentially, today's customer experience can make or break your business.
- ✓ Defaqto reports that more than half of today's customers would pay extra to guarantee better service.
- ✓ And, last, but certainly not least, Harvard Business Review research reports that businesses that are providing an outstanding customer experience are finding that customers who have had the best past experiences spend 140 percent more compared to those who have had the poorest past experience.

# Seamless Communication & Collaboration

#mobileenterprise

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Powering connections



# Mobile Enterprise + Mobile Consumer

90 percent of consumers will check a website before emailing or calling a company. With Mitel, you can create more personalized, contextual and mobile consumer experiences rather than transactional relationships. And do it with a business as mobile-enabled as your customers.

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Open the book and find:

- How today's customers (and their expectations) have evolved
- Ways to identify how your customers wish to interact with your business
- How to assess and improve your current customer experience strategy
- The value of investing in your customer experience
- The cost of a dated strategy
- Best practices for providing the optimal customer experience

## Focus on your customers

The way you communicate with your customers is evolving. Today's consumers carry with them technologies like smartphones that enable them to connect with your organization anytime and anywhere. These technologies put added pressure on your customer experience — to survive and profit, your customer experience strategy needs to be top of mind.

- **Know and understand your customers — who do you serve and what are their preferred communication methods**
- **Discover how the customer experience has been changing — meet the challenge presented by this evolving experience**
- **Evaluate your business — know the quality of customer experience you deliver**
- **Provide the best possible customer experience — listen to your customers, meet their demands, exceed their expectations, deliver consistency**

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